

9 Copilot in Excel

For people who aren't Excel experts, Copilot can raise the game. Copilot provides AI-powered assistance for tasks such as creating formulas, charts, and pivot tables. It can make multi-step changes to the contents of your worksheets in-line, reducing the clicks and how-to lookups. Copilot can suggest ideas for visuals and insights based on the sheet's data. This chapter will show examples of how to use, interact, and troubleshoot.

For data and Excel experts, Copilot isn't a replacement for business analysts. It doesn't yet move data between files, or understand macros or other advanced functions. But it can help create or check Python code! Even if you know the basics, you might find some useful Pro Tips at the end of the chapter.

Copilot in Excel was one of the last apps in which Copilot was generally available, so bear that in mind as you're trying some of these prompts.

Intended Uses

Copilot for Excel is designed to help with various tasks and scenarios, such as:

Feature	Description
Formulas	Create and edit formulas by suggesting possible functions based on your data and context. Copilot can also explain the meaning and logic of formulas.
Charts	Create and format charts by suggesting suitable chart types, layouts and styles based on your data and purpose.
Pivot Tables	Create pivot tables, by suggesting possible fields, values, calculations, and formats based on your data and goals.
Python Code Generation	Use everyday language to describe what you want to do with your data, and Copilot will generate and insert working Python code in the Excel grid.
Ideas and Insights	Generate and discover ideas and insights by asking about suggesting possible questions, hypotheses, trends, patterns, outliers, and correlations

Activating Copilot within Excel

Find the Copilot button on the ribbon. It's located in the Home tab, next to the Add-ins button. Clicking opens the Copilot pane on the right side of the screen, where you can type or speak your request, and see Copilot's suggestions and responses.

Using Copilot in Excel to its Fullest

The following tables summarize how to use Copilot to its fullest, how to interact with it, what capabilities it has, what constraints and caveats it has, and what prompts you can use.

Change the contents of the sheet

Description	Constraints	Prompting Tips
Make edits to the sheet by telling Copilot what you'd like to do, instead of typing or reformatting within the sheet itself.	There's no set list of what will/won't work. "Vibe work" your way through it.	"Show 5 significant digits in any cell with \$ on tab 1." "Color all values less than 5% red." "Shade all cells with values greater than 5% green" "Add a tab in this sheet based on the data in /another_sheet." Fill out the questions asked in this sheet based on answers that may exist in /A_Different_Word_doc.

Forecasting

Description	Constraints	Prompting Tips
<p>Project future numbers based on past performance</p>	<p>Not all forecasts are linear. Copilot can create bullish or bearish forecasts, and allow the Pilot to change its growth projections.</p>	<p>“Combine the first 3 tabs into a fourth tab named Q3 FY26 to date.”</p> <p>“Forecast Q4 earnings based on the first three quarters. Insert into a fifth tab called Q4 forecast</p> <p>“Let’s create two alternative forecasts, one bearish, one bullish. Insert each into its own new tab.”</p> <p>“Now create a FY income projection in column F.”</p> <p>“Visually depict the three forecast scenarios.”</p>

Creating Formulas

Description	Constraints	Prompting Tips
<p>Quickly add new columns with formulas based on your data, reducing manual calculations.</p> <p>Copilot can explain the meaning and logic of formulas.</p>	<p>Copilot isn’t (yet) capable of creating macros.</p>	<p>“Calculate total <cost> per <product> in a new column” (then “Insert Column”).</p> <p>“What is the average value of the <Sale Price> column for each <SKU>?” then “+Add to a new sheet.”</p> <p>“Suggest some formulas” to get other ideas of what’s possible.</p>

Creating Charts

Description	Caveats	Prompting Tips
<p>Create and format charts by suggesting suitable chart types, layouts, titles, labels, colors, and styles.</p>	<p>It's important to ensure that the data is organized and formatted correctly before creating a chart, as this can impact the accuracy and readability of the chart.</p>	<p>"Plot the products vs margin" Then "Add to a new sheet"</p> <p>"Can you create a pie chart for the data in column B of Sheet1?"</p> <p>"Can you suggest a suitable chart type for my data in sheet1?"</p>

Formatting Tables

Capabilities	Caveats	Prompting Tips
<p>Create and format tables by suggesting possible headers, ranges, filters, sorts, formats, and styles.</p>	<p>Functions only work on the table that is currently selected. Make sure that the table you want to work on is active and selected.</p>	<p>"Can you format the data in column B as currency?"</p> <p>"Apply a filter to my table to only show rows where column <x> C is greater than <y>?"</p> <p>"Add a column to compare <x> to <y>"</p>

Pivot Tables

Capabilities	Caveats	Prompting Tips
<p>Create and analyze pivot tables by suggesting possible fields, values, filters, groups, calculations, and formats based on your data and goals.</p>	<p>Copilot cannot create financial models.</p>	<p>"Create a pivot table for the data in column A and column B"</p> <p>"Can you help me summarize the data in column D by calculating the average and displaying it in the values area of my pivot table?"</p>

Ideas and Insights

Capabilities	Caveats	Prompting Tips
<p>Generate and discover ideas and insights by suggesting possible questions, hypotheses, trends, patterns, outliers, and correlations based on your data and domain.</p> <p>Validate and communicate your ideas and insights.</p>	<p>When asked to do something that's available using an existing Excel feature, Copilot may defer the native capability. Scenario Manager is one such function.</p> <p>Copilot will offer to provide more info, and is a decent help tool, but offers no links to external sites.</p>	<p>"Are there trends in my data?"</p> <p>"Can you help me create a chart to visualize the data in my table and highlight any trends or patterns?" Then "+Add to a sheet."</p> <p>"Are there any outliers in my data?"</p>

Troubleshooting Copilot in Excel

Sometimes, you may encounter some issues or errors when using Copilot for Excel. Here are some common problems and solutions that can help you troubleshoot them:

1. Copilot requires files to be saved on OneDrive or SharePoint. If the Copilot button in the ribbon is not selectable, **save the file to the cloud first**.
2. Copilot in Excel works for **tables of up to two million cells** (at the time of writing).
3. There are **several reasons why Copilot might not perform the requested operation or gives an error message**. This may happen if the requested operation is not supported, not available, or not allowed by Excel, or if there is a problem with your data, formula, chart, table, pivot table, macro, sheet, or workbook. Check for any errors or conflicts, and correct them before asking Copilot to perform the operation. You can report the issue by clicking the thumbs down icon in the chat box.
4. **Use the browser** if the desktop app is reacting inconsistently.

Pro Tips in Excel

To make the most of Copilot for Excel, here are tricks to improve efficiency and effectiveness:

1. At the time of writing, there are two options for LLMs to use in Excel (OpenAI's ChatGPT and Anthropic's Claude). Using Auto-Select is recommended unless you prefer one model or another. There are some subtle and ever-changing differences. For instance, Claude excels at very large datasets (long financial reports) and careful, structured analysis.
2. Copilot can help **correct formulas** in your Excel document. In the right-hand chat box, ask it to fix the formula, specifying the cell location and the formula itself.
3. **Ask Copilot to help articulate what it can do.** Ask "Would you please provide example prompts of how Copilot can help me validate and communicate your ideas and insights, and apply best practices for data exploration and storytelling?"
4. It's important to **remember how LLMs work, and to create prompts and set expectations accordingly.** The data you specify (i.e. a column of numbers) are fed into the Large Language Model for processing. Math must be predictable. While numbers and code can be processed by the LLM, it's important to know that LLMs are inherently unpredictable and are currently better with letters than numbers. Copilot in Excel is getting better though!